

OPEB CBID FAQs

What is OPEB CBID?

Other Post-Employment Benefits (OPEB) Collective Bargaining Identifier (CBID) is a new civil service/exempt data item, effective 01/31/19. It denotes whether an employee is eligible or not eligible for OPEB contributions and it is completely computer generated for all departments. In rare instances where an exception OPEB CBID value is needed, the department must submit a Payroll Action Request (PAR) document to Personnel and Payroll Services Division (PPSD) for key entry.

How Does OPEB CBID Affect Payroll OPEB Contributions?

Until Payroll modifications are implemented in 2020, the Employment History (EH) OPEB CBID will have no bearing on Payroll OPEB contributions. In the meantime, the interim Payroll OPEB Contribution process will remain the same.

How Did OPEB CBID Get Updated on EH/PIMS?

The State Controller's Office (SCO) processed an EH mass update on the evening of Thursday, 01/31/19. The mass update posted a 126 transaction effective 01/31/19 for active and on leave records to add OPEB CBID values. Records with appointment or separation expiration dates earlier than 01/31/19, were not updated.

Why Didn't I Get a Turnaround PAR with the New OPEB CBID?

Due to the volume of mass updated records for all Civil Service/Exempt active and on leave employees, the SCO did not produce Turnaround PARs from the OPEB CBID mass update. We apologize for any inconvenience this may cause, but we believe that any potential inconvenience is outweighed by the workload associated with printing, delivering and filing a Turnaround PAR for nearly every employee.

The Personnel Letter Said No Turnaround PARs Were Produced from the OPEB CBID Mass Update, but I Received One.

If a record kicked out of the mass update, but the employee's OPEB CBID value was known, PPCD manually key entered a 126 transaction effective 01/31/19 to update the new OPEB CBID. Those transactions were entered within the next few days after the mass update and they created a Turnaround PAR with OPEB CBID information.

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What Transaction(s) Can I Use to Update OPEB CBID?

If the primary purpose of your EH action is to update/change the employee's OPEB CBID or Employee CBID, use a 126 transaction.

- A 126 transaction should only be effective on the first day of a pay period, whether updating Employee CBID or OPEB CBID.
- Because OPEB CBID is completely computer generated for departments, simply key enter a 126 transaction with the appropriate effective date to generate OPEB CBID. If Employee CBID is changing, you need to enter a value in that field.

Other transactions where OPEB CBID will be generated include:

- All Appointment Transactions
- The 120 and the 405 Miscellaneous Transactions.
 - The 120 and 405 Transactions allow for the entry of Employee CBID. If Employee CBID changes, it is possible that OPEB CBID will also change.

What Values are generated for OPEB CBID?

Eligible vs Not Eligible

In most cases OPEB eligibility is determined by tenure/time base and retirement membership – similar to criteria used to determine if an employee is Health Benefits eligible. However, there are a number of instances where eligibility is determined by virtue of class code, employee CBID and/or class type only. Those exceptions are identified below under Additional Records That Are Not OPEB Eligible.

For most employee's, OPEB eligibility conditions are identified by California Department of Human Resources (CalHR) in their OPEB Policy Statement at <http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422>.

Eligibility conditions for Judicial Council employees are similar to CalHR, with a few small exceptions for Permanent Intermittent and Temporary employees.

Not Eligible: When an employee is not OPEB eligible, OPEB CBID will reflect 'NON'.

Eligible: When an employee is eligible, OPEB CBID will reflect a value that is similar in format to Employee CBID. In most cases, it will be equal to the employee's Employee CBID.

The information below identifies the specific conditions used to determine whether or not an employee is OPEB eligible – with differences shown for civil service/exempt and Judicial Council employees.

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a. Employees are NOT Eligible for OPEB if any of the following conditions are met.

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
1	Any Employee Who is Not a Retirement Member	Equal to N, NA, NM, NO, TD or TM	N/A	N/A	N/A	N/A	NO
2	Any Employee: <ul style="list-style-type: none"> Any Time Base Tenure is Retired Annuitant 	N/A	N/A	= 'R'	N/A	N/A	NO
3	Any Employee: <ul style="list-style-type: none"> Time Base is Indeterminate 	N/A	= 'IND'	N/A	N/A	N/A	NO
4	Any Employee: <ul style="list-style-type: none"> Time Base is Less Than Half-Time 	N/A	Numeric & < '001002'	N/A	N/A	N/A	NO
5	Any Employee: <ul style="list-style-type: none"> Time Base is Intermittent & Tenure is Temporary 	N/A	= 'INT'	= 'E', 'L', 'T'	N/A	N/A	NO
6	Judicial Council Employee Only: <ul style="list-style-type: none"> Time Base is Intermittent & Tenure is Permanent 	N/A	= 'INT'	= 'P'	= 'J'	N/A	NO
7	Not a Judicial Council Employee: <ul style="list-style-type: none"> Any Time Base Tenure is Temporary (Limited Term or TAU) & Appointment Number of Months is Blank. 	N/A	N/A	= 'L', 'T'	Not = 'J'	= Blank	NO
8	Not a Judicial Council Employee: <ul style="list-style-type: none"> Any Time Base Tenure is Temporary (Limited Term or TAU) & Appointment Number of 	N/A	N/A	= 'L', 'T'	Not = 'J'	Non-numeric	NO

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Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
	Months is Non-numeric.						
9	Not a Judicial Council Employee: <ul style="list-style-type: none"> Any Time Base Tenure is Temporary (Limited Term or TAU) & Appointment Number of Months is Numeric AND Equal to or Less Than 6 Months. 	N/A	N/A	= 'L', 'T'	Not = 'J'	Numeric & =/< '06' months	NO

b. Employees ARE Eligible for OPEB if any of the following conditions are met.

If the employee is considered to be OPEB eligible per these conditions, his/her record is then advanced to the OPEB CBID Exception Table and the remaining OPEB CBID generation logic.

Condition #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
10	Any Employee Who Is: <ul style="list-style-type: none"> A Retirement Member & Time Base is Full Time or (Equal to or Greater than Half-time) & Tenure Is Permanent, CEA or Emergency. 	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'FT' or Numeric and = or > '001002'	'P', 'C' or 'E'	N/A	N/A	YES
11	Not a Judicial Council Employee Who is: <ul style="list-style-type: none"> A Retirement Member & Time Base is Intermittent & Tenure is Permanent or CEA. 	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'INT'	'P' or 'C'	Not = 'J'	N/A	YES
12	Not a Judicial Council Employee Who is:	Not Equal to 'N', 'NA',	'FT' or	'L' or "T"	Not = 'J'	Numeric & > '06' months	YES

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Condi- tion #	Description	Retirement Account Code	Time Base	Appointment Tenure	Class Type	Appointment Number of Months	OPEB Eligible
	<ul style="list-style-type: none"> A Retirement Member & Time Base is Full Time or (Equal to or Greater than Half-time) & Tenure is Temporary (Limited Term or TAU) & Appointment Number of Months is Greater than 6 Months. 	'NM', 'NO', 'TD' or 'TM'	Numeric and = or > '001002'				
13	Judicial Council Employee Only Who Is: <ul style="list-style-type: none"> A Retirement Member & Time Base is Full Time or (Equal to or Greater than Half-time) & Tenure is Temporary (TAU) * 	Not Equal to 'N', 'NA', 'NM', 'NO', 'TD' or 'TM'	'FT' or Numeric and = or > '001002'	'T'	= J	N/A	YES

Additional Records That Are Not OPEB Eligible:

The following employee groups are not eligible for OPEB for reasons other than time base, tenure and retirement status. OPEB CBID = 'NON' will be computer generated for these employees.

- Seasonal Class Codes for which a link exists at <http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422>.
- Satellite Wagering Facility employees with Employee CBID E25.
- California Conservation Corps employees.
- Judges, Legislators and Constitutional Officers, Employee CBIDs = E90, E91 and E92.

Records Where OPEB CBID is Not Equal to Employee CBID:

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- A few exceptions exist for specific class codes associated with Employee CBIDs E97, E98, E99 or M99. These exception values will be computer generated. These are also referenced in CalHR Policy: <http://hrmanual.calhr.ca.gov/Home/ManualItem/1/1422>

EE CBID	Class Type	Class Code	OPEB CBID
E97		9704	R06
E97		9705	R06
E97		9766	R06
E98		9706	S06
E98		9767	S06
E99		9764	M06
E99	F	0320	M06
E99	F	0321	M06
E99	F	0322	M06
E99	F	0533	M06
E99	F	1680	M07
E99	F	5033	M06
E99	F	5507	M06
E99	F	6281	M06
E99	F	6298	M06
E99	F	6380	M08
E99	F	6581	M06
E99	F	7642	M06
E99	F	8668	M07
E99	F	8963	M07
E99	F	9042	M05
E99	F	9077	M06
E99	F	9081	M06
E99	F	9380	M06
E99	F	9404	M07
E99	F	9487	M07
E99	F	9593	M06
E99	F	9625	M06
E99	F	9649	M06
E99	F	9657	M06
E99	F	9678	M05
E99	F	9915	M06
E99	L	0318	M06
E99	L	7912	M06
E99	L	8373	M05

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EE CBID	Class Type	Class Code	OPEB CBID
E99	L	8667	M07
E99	L	8964	M07
M99		0011	M01

- Also, there is a very small group of individual Career Executive Assignment (CEA) employees whose OPEB eligibility is tied to a related bargaining unit, mostly for units 6, 7, or 8. These values will be initially computer generated by the 01/31/19 mass update, but any OPEB CBID changes to these records must be submitted to PPSD for key entry, once the CEA appointment is approved by CalHR. (Special instructions will be issued.)

Where Can I Find OPEB CBID on PIMS?

Inquiry Screens

When viewing the Inquiry PIMS PAR 1 screen, OPEB CBID appears on the same line as Position Number, to the immediate right of Employee CBID.

OPEB CBID also appears on the PIMS Inquiry History Type A and B screens. For each of these screens, it will appear on the bottom line, to the immediate right of Employee (EE) CBID.

Update Screens

When keying a transaction where OPEB CBID is considered required/conditional, OPEB CBID will appear on the update screen, but the cursor will skip over the field since it is computer generated only.

- Transactions where OPEB CBID is considered required/conditional include: all appointment transactions and the 120, 126 and 405 transactions.
- For all other transactions, OPEB CBID will carry forward per normal transaction processing.

Where Does OPEB CBID Appear on the PAR?

On both the Turnaround PAR and the Padded PAR forms, OPEB CBID appears as the last (most right) item on Line 1. It is Item #142 and it replaces what used to be the display only/computer generated only item #145, ANNIV DATE. (The employee's actual Anniversary Date is located in Item 330 on Line 3.)

- Item 142 on both PAR forms is shaded since it is a computer generated item.
- The first 'OPEB CBID' Turnaround PARs will be generated from PAR transactions key entered on 02/1/19.
- The first 'OPEB CBID' Padded PARs will be available at General Services on or around 01/31/19.

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I Processed an OPEB CBID Generating Transaction and No OPEB CBID Was Generated.

If the transaction was effective prior to 01/31/19, OPEB CBID is effective 01/31/19. OPEB CBID will not be generated for any transaction effective earlier than 01/31/19.

Why Did I Receive a NOPA on a 120 Transaction?

Previously, 120 transactions did not produce Notice of Personnel Action (NOPA) documents. With the implementation of OPEB CBID, however, NOPA messages are being generated for specific changes to OPEB CBID. If that change occurs on a 120 transaction, a NOPA is generated. This is the only condition for which a 120 transaction will produce a NOPA.

The following describes when an OPEB CBID change will generate a NOPA and what the NOPA message will say.

NOTE: NOPA messages will only be produced for transactions that are effective 01/31/19 and later.

Message #	Message Text	When a NOPA is Produced
0148	YOU ARE NOT SUBJECT TO OPEB CONTRIBUTIONS TO PRE-FUND RETIREE HEALTH BENEFITS.	<ul style="list-style-type: none">Any Appointment Transaction where the After Image OPEB CBID = "NON".
		<ul style="list-style-type: none">Miscellaneous Change Transaction 120, 126, or 405 where:<ul style="list-style-type: none">The After Image OPEB CBID = "NON" andThe After Image OPEB CBID ≠ the Before Image OPEB CBID.
0149	YOU ARE SUBJECT TO OPEB CONTRIBUTIONS TO PRE-FUND RETIREE HEALTH BENEFITS.	<ul style="list-style-type: none">Any Appointment Transaction where the After Image OPEB CBID ≠ "NON".
		<ul style="list-style-type: none">Miscellaneous Change Transaction 120, 126, or 405 where:<ul style="list-style-type: none">The After Image OPEB CBID ≠ "NON" andThe After Image OPEB CBID ≠ the Before Image OPEB CBID.

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How Does OPEB CBID Work with Out of Sequence Transactions?

For Out of Sequence processing, OPEB CBID works similarly to any Carry Forward data item, except for any transactions where OPEB CBID is considered required/conditional, it is computer generated instead of key entered. Transactions for which this occurs include: all Appointment transactions and the 120, 126 and 405 transactions. For all other transactions, OPEB CBID carries forward per normal transaction processing.

If processing an out of sequence transaction effective prior to 01/31/19, OPEB CBID will be blank. Per normal out of sequence processing, when corrections are processed for existing transactions effective equal to or greater than 01/31/19, the corrected transactions will generate OPEB CBID according to the eligibility information contained in those transactions.

The Personnel Letter Mentions OPEB CBID Exceptions. When and Why Do I Send a PAR to PPSD for Key Entry of an Exception OPEB CBID?

Though all department keyed transactions generate OPEB CBID, PPSD has the option to allow OPEB CBID to generate or to key enter an exception value, if needed.

At this time, the only known exception to the computer generated OPEB CBID involves a very small group of CEA employees. This group includes specific individuals for whom their OPEB eligibility is tied to a bargaining unit for which their assignment is associated – rather than the CEA CBID, M01.

This exceptional OPEB alignment is decided when the individual's CEA appointment is approved by CalHR. At that time, CalHR communicates the OPEB CBID information to both the department and to PPSD. CalHR, the department, and PPSD coordinate how the employee's OPEB information should be documented/processed. In most cases, the department will process the CEA appointment and allow OPEB CBID to generate, then submit a PAR transaction so that PPSD can key enter the appropriate OPEB CBID information.

- If the CEA appointment is effective the first of a pay period, the department can submit a 126 transaction or an appointment correct.
- If the CEA appointment is effective mid-month, the department should submit an appointment correct.
- In either case, PAR item #142 will be shaded. The department will need to enter, as clearly as possible, the exception OPEB CBID and they must describe why they are submitting the PAR to PPSD for key entry.

NOTE: When a PAR is submitted to PPSD for this purpose, the PPOB unit receiving the PAR must check with PMAB EH to confirm the appropriate OPEB CBID information per CalHR communication.

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